

ORDER FOR SUPPLIES OR SERVICES

PAGE OF PAGES
1 10

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

1. DATE OF ORDER 11/15/2013		2. CONTRACT NO. (If any) EP-W-11-011		6. SHIP TO: a. NAME OF CONSIGNEE Melissa Kramer	
3. ORDER NO. 0033		4. REQUISITION/REFERENCE NO. PR-OA-13-00150			
5. ISSUING OFFICE (Address correspondence to) HPOD US Environmental Protection Agency Headquarters Procurement Operations Ariel Rios Building 1200 Pennsylvania Avenue, NW Washington DC 20460				b. STREET ADDRESS USEPA Headquarters, MC#1807T William Jefferson Clinton Building 1200 Pennsylvania Avenue, N. W. kramer.melissa@epa.gov	
				c. CITY Washington	e. ZIP CODE 20460
7. TO: NA				f. SHIP VIA	
a. NAME OF CONTRACTOR CH2M HILL INC.				8. TYPE OF ORDER	
b. COMPANY NAME				<input type="checkbox"/> a. PURCHASE <input checked="" type="checkbox"/> b. DELIVERY REFERENCE YOUR: Proposal dated: 9/16/13 Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.	
c. STREET ADDRESS 9191 S JAMAICA STREET				Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.	
d. CITY Englewood		e. STATE CO	f. ZIP CODE 80112		
9. ACCOUNTING AND APPROPRIATION DATA See Schedule				10. REQUISITIONING OFFICE Reconstruct Originating Office	

11. BUSINESS CLASSIFICATION (Check appropriate box(es)) <input type="checkbox"/> a. SMALL <input checked="" type="checkbox"/> b. OTHER THAN SMALL <input type="checkbox"/> c. DISADVANTAGED <input type="checkbox"/> d. WOMEN-OWNED <input type="checkbox"/> e. HUBZone <input type="checkbox"/> f. SERVICE-DISABLED VETERAN-OWNED <input type="checkbox"/> g. WOMEN-OWNED SMALL BUSINESS (WOSB) ELIGIBLE UNDER THE WOSB PROGRAM <input type="checkbox"/> h. EDWOSB				12. F.O.B. POINT Destination	
13. PLACE OF a. INSPECTION Destination		b. ACCEPTANCE Destination		14. GOVERNMENT B/L NO.	
				15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)	
				16. DISCOUNT TERMS	

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	DUNS Number: (b)(4) TOPO: Melissa Kramer Max Expire Date: 10/31/2014 Continued ...					

SEE BILLING INSTRUCTIONS ON REVERSE	18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.		17(i) TOTAL (Cont. pages)
	21. MAIL INVOICE TO:						
	a. NAME RTP Finance Center						\$70,228.27
	b. STREET ADDRESS (or P.O. Box) US Environmental Protection Agency RTP-Finance Center Mail Drop D143-02 109 TW Alexander Drive						\$70,228.27
c. CITY Durham			d. STATE NC	e. ZIP CODE 27711		17(i) GRAND TOTAL	

22. UNITED STATES OF AMERICA BY (Signature)

23. NAME (Typed)
Kathryn Barton
TITLE: CONTRACTING/ORDERING OFFICER

ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION

PAGE NO
2

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 11/15/2013	CONTRACT NO. EP-W-11-011	ORDER NO. 0033
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ITEM NO. (a)	SUPPLIES/SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
0001	<p>Admin Office: HPOD US Environmental Protection Agency Headquarters Procurement Operations Ariel Rios Building 1200 Pennsylvania Avenue, NW Washington DC 20460 Period of Performance: 11/20/2013 to 10/31/2014</p> <p>Smart Growth Economic Development Toolkit: Kelso, Washington</p> <p>Providing technical assistance in incorporating smart growth approaches into an economic development plan for Kelso, Washington in accordance with the attached Statement of Work and the contractor's proposal dated September 16, 2013.</p> <p>Estimated Cost: (b)(4) Fixed Fee: (b)(4) Total Cost Plus Fixed Fee: \$70,228.27</p> <p>Accounting Info: 13-14-B-11W-301MA4-2505---1311W31075-0 01 BFY: 13 EFY: 14 Fund: B Budget Org: 11W Program (PRC): 301MA4 Budget (BOC): 2505 DCN - Line ID: 1311W31075-001 Funding Flag: Partial Funded: \$70,228.27</p> <p>The obligated amount of award: \$70,228.27. The total for this award is shown in box 17(i).</p>				70,228.27	

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17(H))

\$70,228.27

Statement of Work
Contract Number: EP-W-11-009/EP-W-11-010/EP-W-11-011
RFO Number: 0033

I. TITLE

Smart Growth Economic Development Toolkit

II. PERIOD OF PERFORMANCE

From: Date of award

To: October 31, 2014

III. BACKGROUND

The Cowlitz-Wahkiakum Council of Governments (CWCOG) has been selected to receive technical assistance under EPA's Smart Growth Implementation Assistance Program. The goal of the technical assistance is to develop an economic development toolkit for the city of Kelso, Washington, focused specifically on the South Kelso neighborhood. The toolkit should not only advance economic development, but also focus on infill and redevelopment to achieve better environmental outcomes as well as address health and equity issues in the community.

South Kelso has a well-established residential core bounded by features of citywide and regional significance, including Downtown Kelso to the west; Southwest Washington Regional Airport, Three Rivers Mall, and Talley Way Industrial Area to the southeast; and county/city civic infrastructure within the northern commercial district. The neighborhood of 5,856 people (in 2,264 households) is about half of the City of Kelso's population. It is relatively rich in racial and ethnic diversity (17%) with many Hispanic residents (12.6%). The neighborhood has many young families in a county that is dominated by an aging "boomer" population.

Cowlitz County ranks 33rd out of 39 counties in the state of Washington for overall health outcomes. The county fares even worse according to social and economic indicators, including educational attainment, unemployment, child poverty, children in single parent households, inadequate social support, and violent crime. These causes and consequences of these challenges are seen in the South Kelso neighborhood. The residents of South Kelso face challenging living conditions due to widespread poverty and disinvestment—a high concentration of run down, vacant, and boarded up homes, high volumes of rail and truck traffic, industrial pollution, high crime rates, and lack of many services and amenities.

Kelso has taken a number of steps to advance economic development in ways that can support health and social equity concerns. However, these efforts have lacked sufficient coordination. Kelso now needs a set of concrete implementation steps that can help it to reach already identified community goals.

In 2010, the Cowlitz Economic Development Council completed the "Turning Point" strategic plan for economic diversification that identified potential growth sectors for the region, including

specialized manufacturing, advanced logistics and distribution, healthcare, and professional/technical services. The report identified the need to prepare the local workforce for employment in these industries and emphasized the importance of creating quality places that will attract employers and employees.

In July 2012, EPA provided CWCOC technical assistance on using smart growth to produce fiscal and economic health through the Building Blocks for Sustainable Communities Program. Through the workshop and follow up meetings, the region identified the following priorities:

- Pursue solutions to address major infrastructure issues such as transportation and flooding.
- Streamline the permitting process by coordinating development standards.
- Develop a regional approach to workforce training and re-training in order to address the loss of the experienced workforce due to baby boomer retirements and economic diversification.

Toward this end, CWCOC staff assisted the City of Kelso in securing a team of masters-level candidates in urban planning from Portland State University to develop a five-year neighborhood action plan. It will focus on community design that promotes active, healthy lifestyles and supporting existing areas with economic development opportunity. This work will create a stepping stone toward development of a new city comprehensive plan beginning late 2013 or early 2014.

In addition to these efforts, Kelso will benefit from other related local initiatives, including:

- Active Community Environments for All Ages – a CWCOC partnership with the Kaiser Permanente Community Fund to integrate health and planning policy that will improve the quality of the built environment and create Active Community Environments for All Ages.
- Healthy Eating Active Living – a CWCOC partnership with Oregon Public Health Institute to promote community health within existing planning efforts;
- Community Health Improvement Plan – a county-wide strategic plan led by Cowlitz County Public Health Department
- Transportation Systems Plan – a “Complete Streets” plan completed and moving towards implementation for the Kelso-Longview Urban Area
- 2014 Longview-Kelso Consolidated Community Development and Housing Plan

In many communities, economic development efforts are disconnected from land use policies and other community goals. The desire to attract businesses or industries often supersedes all other priorities, leading many communities to ignore where new businesses locate, how new facilities and infrastructure are designed, and whether existing residents have the education and skills to benefit from new jobs. Economic development initiatives can even undermine efforts to revitalize traditional commercial corridors and promote active transportation or lead to displacement of community members.

IV. PURPOSE AND OBJECTIVE

The goals of this technical assistance project are to:

- (1) Help the city of Kelso understand how to incorporate smart growth approaches into an economic development plan for South Kelso so that efforts to increase investment and economic opportunities in the neighborhood support a broad range of community goals. These goals include infill redevelopment that can lead to better environmental outcomes, community design that promotes active transportation and provides recreation opportunities for improved resident health, and improved social equity and quality of life for existing residents.
- (2) Create a resource that both smart growth experts and economic development professionals with no expertise in smart growth would find credible and compelling.

The products of this technical assistance should serve the specific needs of South Kelso while also providing a guide for other communities facing similar challenges.

V. QUALITY ASSURANCE (QA) REQUIREMENTS

Check [] Yes if the following is required or [X] NO if the following is not required. The Contractor shall submit with their technical proposal a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project that generates environmental data using models.

TOPO's will provide additional information here, if **Yes** is checked above.

VI. TASKS AND DELIVERABLES

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

Task 1: Information Needed to Develop a Smart Growth Economic Development Plan (Under work area II.A.2 – Development and Analysis of Policy Options)

The contractor shall draw on expertise from the fields of traditional economic development, community development, smart growth, and other relevant areas to prepare a document that:

- (1) Describes the place-specific information a community like Kelso needs to develop a smart growth economic development plan. This information shall be presented as a matrix/checklist that identifies:
 - (a) Goals (e.g., to increase employment in existing areas).

- (b) Indicators that could be used to track progress toward goals (e.g., the number of jobs per acre).
- (c) Analyses needed or data sources that the community could use to update indicators over time.
- (d) Targets (e.g., a specific number of jobs per acre the community could aim for).

This portion of the document shall be applicable to any community of Kelso's size and demographic/economic profile, i.e., with little population growth, chronic under-/unemployment, an aging blue-collar population, and budget constraints.

- (2) Implements the matrix/checklist for the South Kelso neighborhood. The contractors shall first review relevant city, county, and regional plans and initiatives, with particular emphasis on:
 - The South Kelso Revitalization Plan.
 - The Southwest Washington Workforce Development Strategic Plans.
 - The Cowlitz Economic Development Council's "Turning Point" (TIPS) Strategic Plan.
 - The River City Transit agency plan

This review is intended to familiarize the consulting team with key priorities of the region and to help determine which analyses or data sources identified in task 1(1)(c) are available and which are missing. These plans and other relevant materials will be posted on the CWCOC web site at <http://www.cwcog.org/planning.htm#Plans>.

Further information needed to determine which analyses or data sources identified in task 1(1)(c) are available and which are missing shall be identified through phone discussions and email with the Cowlitz-Wahkiakum Council of Governments, the Kelso City Manager or his staff, and the Cowlitz Economic Development Council. EPA will organize a kick-off conference call with these entities at the start of task 1. The contractor shall use its expertise to help the community identify all relevant information.

The contractor shall spend no more than 10 to 15 hours becoming familiar with existing plans and initiatives and identifying other sources of information. The contractor shall review plans and initiatives at a level of detail that enables the contractor to cover them all within this time allotment.

For all missing analyses or data sources that are identified, the contractor shall describe:

- (a) The steps Kelso could take to conduct the analyses or acquire the data, or, if the identified data sources are not available for the South Kelso neighborhood, either the steps Kelso could take to acquire the best available alternative data or alternative strategies Kelso could pursue to track progress towards identified goals.

- (b) Who would take the steps, e.g., which agency or office is best positioned to take the steps, how other communities generally acquire such information, and whether outside expertise would be needed and how it could be acquired.
- (c) Strategies Kelso could use to fund this work.

The document shall be 10 to 15 pages. The contractors shall submit a complete first draft of the document to EPA four weeks after the kick-off call with the community. The contractor shall deliver a complete revised second draft of the paper to EPA two weeks after receiving comments on the first draft.

Task 2: Policy Tools to Develop a Smart Growth Economic Development Plan (Under work area II.A.2 – Development and Analysis of Policy Options)

The contractor shall draw on expertise from the fields of traditional economic development, community development, smart growth, and other relevant areas to prepare a document that:

- (1) Describes specific, implementable policy tools and actions that a community could use to implement a smart growth economic development plan that meets the purpose and objective of this technical assistance, for example:
 - Approaches (policies, incentives, partnerships, etc.) that encourage infill and redevelopment as opposed to greenfield development without the need for public subsidy.
 - Tools to help private and public sector representatives evaluate and improve the economic, economic, environmental, and social impact of proposed projects, such as “triple bottom line” tools.
 - Alternative zoning approaches that support smart growth principles.
 - Methods to generate investment in residential development, including alternative housing types.
 - Methods to finance maintenance and replacement of aging infrastructure or to economically serve isolated patches of unincorporated properties.
 - Pathways to integrate workforce development and economic diversification at the neighborhood or city level.

Each tool and action should be linked to achieving one of the goals identified in task 1. The tools and actions should be practical and affordable for Kelso to implement given fiscal constraints.

This portion of the document shall be applicable to any community of Kelso’s size and demographic/economic profile, i.e., with little population growth, chronic under-/unemployment, an aging blue-collar population, and budget constraints.

(2) Reviews existing policies in Kelso to conduct an analysis of which of those identified in task 2(1) are in place and which are lacking. For those not in place, the contractor shall identify:

- The steps Kelso would need to take to implement the policy.
- Who would take the steps and what authority would be needed, e.g., which agency or office is best positioned to take the steps or generally does in other communities and whether state, voter, or other approval is needed.

The contractor shall identify existing policies and evaluate which new policies are likely to be most effective in Kelso through email and approximately 3 hours (total) of phone interviews with 3-6 stakeholders from or identified by the Cowlitz-Wahkiakum Council of Governments, the Kelso City Manager or his staff, and the Cowlitz Economic Development Council. The contractor shall use its expertise to help the community identify all relevant policies.

The document shall be 15 to 20 pages. The contractors shall submit a complete first draft of the document to EPA four weeks after submitting the second draft of task 1. The contractor shall deliver a complete revised second draft of the paper to EPA two weeks after receiving comments on the first draft.

Task 3: Site Visit (Under work area II.A.2 – Development and Analysis of Policy Options)

The contractor shall work with EPA, the Cowlitz-Wahkiakum Council of Governments, the Kelso City Manager or his staff, and the Cowlitz Economic Development Council to convene a 2.5-day site visit in Kelso, Washington involving meetings with elected officials, city staff, and the public to:

- Present the findings of tasks 1 and 2, including the expected benefits for Kelso of implementing the policy tools identified in task 2(2).
- Solicit feedback on which policy tools could work in Kelso and seek consensus on which tools are worthwhile to pursue in the short term and long term.

The contractors responsibilities for this task include:

- Working with EPA and the technical assistance recipients to set dates, secure meeting rooms, and identify attendees for each meeting that will occur during the site visit.
- Drafting an overall agenda for the site visit and agendas for each meeting that will occur during the site visit.
- Preparing presentations for meetings.
- Taking notes at all meetings.
- Facilitating all meetings.

EPA will have final approval over the agendas and selection of the meeting rooms, attendees, and presenters. The contractor shall submit draft agendas and invitation lists two weeks after submitting the second draft of task 2 or 6 weeks before the scheduled site visit, whichever occurs sooner. The contractors shall submit final agendas and invitation lists one week after receiving comments on the first drafts.

Task 4: Complete Smart Growth and Economic Development Toolkit (Under work area II.A.2 – Development and Analysis of Policy Options)

The contractor shall develop an economic development toolkit that fully integrates smart growth strategies. It shall present a set of actionable steps for the city of Kelso to create greater economic opportunities in the South Kelso neighborhood while improving environmental, human health, and social equity outcomes. The toolkit shall contain:

- The final draft of task 1, including an additional column in the matrix that contains the policy tools and actions identified in task 2 associated with each goal.
- The final draft of task 2(1).
- A final draft of task 2(2), modified based on community input, with a discussion of the ways it was modified based on that input. The new material shall be 3-4 pages.
- Five vignettes of specific challenges faced by Kelso and how the toolkit could help address those challenges. Each shall be accompanied by a publication-quality photo of Kelso. Each vignette shall be approximately one page.
- How climate change is likely to affect Kelso's precipitation, temperature, and severe weather events based on the future scenarios for the period of 2021-2050 in <http://scenarios.globalchange.gov/scenarios/climate> and how this toolkit could help Kelso address expected challenges. This material shall be one-half to one page.
- Three case studies, each demonstrating how another community has successfully addressed a challenge Kelso faces (e.g., a struggling mall, need to attract manufacturing, poor community health, equity challenges). Each shall be accompanied by a publication-quality photo.
- All other components noted in the Office of Sustainable Communities Report Guidance, e.g., an executive summary, introduction, and next steps section.

The contractors shall submit a complete first draft of the document to EPA three weeks after the conclusion of the site visit. The contractor shall deliver a revised second draft of the document to EPA two weeks after receiving comments on the first draft. EPA comments on the first draft will be limited to the new material not previously commented on. The contractor shall deliver a revised, proofread, and copy-edited third draft of the document to EPA two weeks after receiving comments on the second draft. EPA's review process between drafts two and three takes approximately 8 to 12 weeks. The contractor shall provide all photos and charts used in the document in their native format as separate files, in addition to embedding them in the final document.

The final deliverable shall conform to the Office of Sustainable Communities Style Guide and Report Guidance. The contractor shall include citations using footnotes for all material used in preparing the report, including prior work done by the author. The contractor shall primarily use original language to describe other cited work, including prior work done by the author. Any text

taken verbatim from another source shall appear in quotation marks. All photos, images, and charts used in the document shall be accompanied by OSC's document release form granting EPA permission for use or demonstration that the photo is already licensed for such use.

VII. SCHEDULE FOR DELIVERABLES

The contractor shall provide the following specific deliverables to the EPA TOPO:

	Deliverable	Date Due
Task 1	Document draft 1	Four weeks after community kick-off call
	Document draft 2	Two weeks after receiving EPA comments on draft 1
Task 2	Document draft 1	Four weeks after submitting draft 2 of task 1
	Document draft 2	Two weeks after receiving EPA comments on draft 1
Task 3	Agendas and invitation lists draft 1	Two weeks after submitting the second draft of task 2, or 6 weeks before the scheduled site visit, whichever occurs sooner
	Agendas and invitation lists draft 2	One week after receiving EPA comments on draft 1
	Site visit	Approximately 8 weeks after submitting the second draft of task 2
Task 4	Document draft 1	Three weeks after completion of the site visit
	Document draft 2	Two weeks after receiving comments on the first draft
	Document draft 3	Two weeks after receiving comments on the second draft

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT			1. CONTRACT ID CODE		PAGE OF PAGES 1 11		
2. AMENDMENT/MODIFICATION NO. 001		3. EFFECTIVE DATE 04/01/2014		4. REQUISITION/PURCHASE REQ. NO. See Schedule		5. PROJECT NO. (If applicable)	
6. ISSUED BY HPOD US Environmental Protection Agency Headquarters Procurement Operations Ariel Rios Building 1200 Pennsylvania Avenue, NW Washington DC 20460		CODE		7. ADMINISTERED BY (If other than Item 6)		CODE	
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) CH2M HILL INC. Attn: NA 9191 S JAMAICA STREET Englewood CO 80112		(x)		9A. AMENDMENT OF SOLICITATION NO.			
				9B. DATED (SEE ITEM 11)			
		x		10A. MODIFICATION OF CONTRACT/ORDER NO. EP-W-11-011 0033			
				10B. DATED (SEE ITEM 13)		11/15/2013	
CODE (b)(4)		FACILITY CODE					

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☐ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended. ☐ is not extended.
Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required) Net Increase: \$15,724.79
See Schedule

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
X	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: FAR 52.243-2 (a) (1) -- Changes (AUG 1987) Alternate I (APR 1984) and FAR 52.216-22 (OCT 1995)
	D. OTHER (Specify type of modification and authority)

E. IMPORTANT: Contractor ☐ is not, ☒ is required to sign this document and return 1 copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

DUNS Number: (b)(4)

TOPO: Melissa Kramer Max Expire Date: 03/18/2015

The purpose of this modification is to:

1. Incorporate changes made to the statement of work (attached);
2. Extend the period of performance from 31 October 2014 to 18 March 2015;
3. Increase the approved cost ceiling per the breakdown identified in the line item 001 description below; and

Continued ...

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Stefan Martiyan	
15B. CONTRACTOR/OFFEROR (Signature of person authorized to sign)	15C. DATE SIGNED	16B. DATE SIGNED ELECTRONIC SIGNATURE	16C. DATE SIGNED 04/17/2014

CONTINUATION SHEET

REFERENCE NO. OF DOCUMENT BEING CONTINUED

EP-W-11-011/0033/001

PAGE 2 OF 11

NAME OF OFFEROR OR CONTRACTOR

CH2M HILL INC.

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	<p>4. Add funding in the amount of \$15,724.79 to fully fund the task order.</p> <p>LIST OF CHANGES: Reason for Modification : Supplemental Agreement for work within scope</p> <p>Period Of Performance End Date changed from 2014-10-31 to 2015-03-18</p> <p>Total Amount for this Modification: \$15,724.79 New Total Amount for this Version: \$85,953.06 New Total Amount for this Award: \$85,953.06 Obligated Amount for this Modification: \$15,724.79 New Total Obligated Amount for this Award: \$85,953.06</p> <p>Maximum Potential Expiration Date changed to : 03/18/2015 CHANGES FOR LINE ITEM NUMBER: 1 Description changed to Smart Growth Economic Development Toolkit: Kelso, Washington</p> <p>Providing technical assistance in incorporating smart growth approaches into an economic development plan for Kelso, Washington in accordance with the attached Statement of Work (revised per modification 001), the contractor's proposal dated September 26, 2014, and the supplemental information and revised cost estimate dated February 14, 2014.</p> <p>Estimated Cost: (b)(4) Fixed Fee: (b)(4) Total Cost Plus Fixed Fee: \$85,953.06</p> <p>Total Amount changed from \$70,228.27 to \$85,953.06 Obligated Amount for this modification: \$15,724.79 End Date changed from 2014-10-31 to 2015-03-18</p> <p>CHANGES FOR DELIVERY LOCATION: HPOD EPA WEST Amount changed from \$70,228.27 to \$85,953.06</p> <p>NEW ACCOUNTING CODE ADDED: Account code: 13-14-B-11W-301MA4-2505-1411W31113-002 Amount: \$2,526.07</p> <p>Continued ...</p>				

CONTINUATION SHEET

REFERENCE NO. OF DOCUMENT BEING CONTINUED

EP-W-11-011/0033/001

PAGE 3 OF 11

NAME OF OFFEROR OR CONTRACTOR

CH2M HILL INC.

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	<p>NEW ACCOUNTING CODE ADDED:</p> <p>Account code: 14-15-B-11W-301MA4-2505-1411W31113-001 Amount: \$13,198.72 Delivery Location Code: HPOD EPA WEST HPOD EPA WEST US Environmental Protection Agency USEPA West (EPA West) [Old Customs Building] 1301 Constitution Avenue NW Washington DC 20004 USA</p> <p>Payment:</p> <p>RTP Finance Center US Environmental Protection Agency RTP-Finance Center (D143-02) 109 TW Alexander Drive Durham NC 27711</p> <p>FOB: Destination Period of Performance: 11/20/2013 to 03/18/2015</p>				

Statement of Work
Contract Number: EP-W-11-009/EP-W-11-010/EP-W-11-011
RFO Number: 0033

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Smart Growth Economic Development Toolkit

II. PERIOD OF PERFORMANCE

From: Date of award

To: ~~October 31, 2014~~ March 18, 2015

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- Streamline the permitting process by coordinating development standards.
- Develop a regional approach to workforce training and re-training in order to address the loss of the experienced workforce due to baby boomer retirements and economic diversification.

Toward this end, CWCOC staff assisted the City of Kelso in securing a team of masters-level candidates in urban planning from Portland State University to develop a five-year neighborhood action plan. It will focus on community design that promotes active, healthy lifestyles and supporting existing areas with economic development opportunity. This work will create a stepping stone toward development of a new city comprehensive plan beginning late 2013 or early 2014.

In addition to these efforts, Kelso will benefit from other related local initiatives, including:

- Active Community Environments for All Ages – a CWCOC partnership with the Kaiser Permanente Community Fund to integrate health and planning policy that will improve the quality of the built environment and create Active Community Environments for All Ages.
- Healthy Eating Active Living – a CWCOC partnership with Oregon Public Health Institute to promote community health within existing planning efforts;
- Community Health Improvement Plan – a county-wide strategic plan led by Cowlitz County Public Health Department
- Transportation Systems Plan – a “Complete Streets” plan completed and moving towards implementation for the Kelso-Longview Urban Area
- 2014 Longview-Kelso Consolidated Community Development and Housing Plan

In many communities, economic development efforts are disconnected from land use policies and other community goals. The desire to attract businesses or industries often supersedes all other priorities, leading many communities to ignore where new businesses locate, how new facilities and infrastructure are designed, and whether existing residents have the education and skills to benefit from new jobs. Economic development initiatives can even undermine efforts to revitalize traditional commercial corridors and promote active transportation or lead to displacement of community members.

IV. PURPOSE AND OBJECTIVE

The goals of this technical assistance project are to:

- (1) Help the city of Kelso understand how to incorporate smart growth approaches into an economic development plan for South Kelso so that efforts to increase investment and economic opportunities in the neighborhood support a broad range of community goals. These goals include infill redevelopment that can lead to better environmental outcomes, community design that promotes active transportation and provides recreation opportunities for improved resident health, and improved social equity and quality of life for existing residents.
- (2) Create a resource that both smart growth experts and economic development professionals with no expertise in smart growth would find credible and compelling.

The products of this technical assistance should serve the specific needs of South Kelso while also providing a guide for other communities facing similar challenges.

V. QUALITY ASSURANCE (QA) REQUIREMENTS

Check [] Yes if the following is required or [X] NO if the following is not required. The Contractor shall submit with their technical proposal a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project that generates environmental data using models.

TOPO's will provide additional information here, if **Yes** is checked above.

VI. TASKS AND DELIVERABLES

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

Task 1: Information Needed to Develop a Smart Growth Economic Development Plan (Under work area II.A.2 – Development and Analysis of Policy Options)

The contractor shall draw on expertise from the fields of traditional economic development, community development, smart growth, and other relevant areas to prepare a document that:

- (1) Describes the place-specific information a community like Kelso needs to develop a smart growth economic development plan. This information shall be presented as a matrix/checklist that identifies:
 - (a) Goals (e.g., to increase employment in existing areas).

- (b) Indicators that could be used to track progress toward goals (e.g., the number of jobs per acre).
- (c) Analyses needed or data sources that the community could use to update indicators over time.
- (d) Targets (e.g., a specific number of jobs per acre the community could aim for).

This portion of the document shall be applicable to any community of Kelso's size and demographic/economic profile, i.e., with little population growth, chronic under-/unemployment, an aging blue-collar population, and budget constraints.

- (2) Implements the matrix/checklist for the South Kelso neighborhood. The contractors shall first review relevant city, county, and regional plans and initiatives, with particular emphasis on:
 - The South Kelso Revitalization Plan.
 - The Southwest Washington Workforce Development Strategic Plans.
 - The Cowlitz Economic Development Council's "Turning Point" (TIPS) Strategic Plan.
 - The River City Transit agency plan

This review is intended to familiarize the consulting team with key priorities of the region and to help determine which analyses or data sources identified in task 1(1)(c) are available and which are missing. These plans and other relevant materials will be posted on the CWCOC web site at <http://www.cwcog.org/planning.htm#Plans>.

Further information needed to determine which analyses or data sources identified in task 1(1)(c) are available and which are missing shall be identified through phone discussions and email with the Cowlitz-Wahkiakum Council of Governments, the Kelso City Manager or his staff, and the Cowlitz Economic Development Council. EPA will organize a kick-off conference call with these entities at the start of task 1. The contractor shall use its expertise to help the community identify all relevant information.

The contractor shall spend no more than 10 to 15 hours becoming familiar with existing plans and initiatives and identifying other sources of information. The contractor shall review plans and initiatives at a level of detail that enables the contractor to cover them all within this time allotment.

For all missing analyses or data sources that are identified, the contractor shall describe:

- (a) The steps Kelso could take to conduct the analyses or acquire the data, or, if the identified data sources are not available for the South Kelso neighborhood, either the steps Kelso could take to acquire the best available alternative data or alternative strategies Kelso could pursue to track progress towards identified goals.

- (b) Who would take the steps, e.g., which agency or office is best positioned to take the steps, how other communities generally acquire such information, and whether outside expertise would be needed and how it could be acquired.
- (c) Strategies Kelso could use to fund this work.

The document shall be 10 to 15 pages. The contractors shall submit a complete first draft of the document to EPA four weeks after the kick-off call with the community. The contractor shall deliver a complete revised second draft of the paper to EPA two weeks after receiving comments on the first draft.

Task 2: Policy Tools to Develop a Smart Growth Economic Development Plan (Under work area II.A.2 – Development and Analysis of Policy Options)

The contractor shall draw on expertise from the fields of traditional economic development, community development, smart growth, and other relevant areas to prepare a document that:

- (1) Describes specific, implementable policy tools and actions that a community could use to implement a smart growth economic development plan that meets the purpose and objective of this technical assistance, for example:
 - Approaches (policies, incentives, partnerships, etc.) that encourage infill and redevelopment as opposed to greenfield development without the need for public subsidy.
 - Tools to help private and public sector representatives evaluate and improve the economic, environmental, and social impact of proposed projects, such as “triple bottom line” tools.
 - Alternative zoning approaches that support smart growth principles.
 - Methods to generate investment in residential development, including alternative housing types.
 - Methods to finance maintenance and replacement of aging infrastructure or to economically serve isolated patches of unincorporated properties.
 - Pathways to integrate workforce development and economic diversification at the neighborhood or city level.

Each tool and action should be linked to achieving one of the goals identified in task 1. The tools and actions should be practical and affordable for Kelso to implement given fiscal constraints.

This portion of the document shall be applicable to any community of Kelso’s size and demographic/economic profile, i.e., with little population growth, chronic under-/unemployment, an aging blue-collar population, and budget constraints.

(2) Reviews existing policies in Kelso to conduct an analysis of which of those identified in task 2(1) are in place and which are lacking. For those not in place, the contractor shall identify:

- The steps Kelso would need to take to implement the policy.
- Who would take the steps and what authority would be needed, e.g., which agency or office is best positioned to take the steps or generally does in other communities and whether state, voter, or other approval is needed.

The contractor shall identify existing policies and evaluate which new policies are likely to be most effective in Kelso through email and approximately 3 hours (total) of phone interviews with 3-6 stakeholders from or identified by the Cowlitz-Wahkiakum Council of Governments, the Kelso City Manager or his staff, and the Cowlitz Economic Development Council. The contractor shall use its expertise to help the community identify all relevant policies.

The document shall be 15 to 20 pages. The contractors shall submit a complete first draft of the document to EPA ~~four~~ six (6) weeks after submitting the second draft of task 1. The contractor shall deliver a complete revised second draft of the paper to EPA two weeks after receiving comments on the first draft.

Task 3: Site Visit (Under work area II.A.2 – Development and Analysis of Policy Options)

The contractor shall work with EPA, the Cowlitz-Wahkiakum Council of Governments, the Kelso City Manager or his staff, and the Cowlitz Economic Development Council to convene a 2.5-day site visit in Kelso, Washington involving meetings with elected officials, city staff, and the public to:

- Present the findings of tasks 1 and 2, including the expected benefits for Kelso of implementing the policy tools identified in task 2(2).
- Solicit feedback on which policy tools could work in Kelso and seek consensus on which tools are worthwhile to pursue in the short term and long term.

The contractors responsibilities for this task include:

- Working with EPA and the technical assistance recipients to set dates, secure meeting rooms, and identify attendees for each meeting that will occur during the site visit.
- Drafting an overall agenda for the site visit and agendas for each meeting that will occur during the site visit.
- Preparing presentations for meetings.
- Taking notes at all meetings.
- Facilitating all meetings.

EPA will have final approval over the agendas and selection of the meeting rooms, attendees, and presenters. The contractor shall submit draft agendas and invitation lists two weeks after submitting the second draft of task 2 or 6 weeks before the scheduled site visit, whichever occurs sooner. The contractors shall submit final agendas and invitation lists one week after receiving comments on the first drafts.

Task 4: Complete Smart Growth and Economic Development Toolkit (Under work area II.A.2 – Development and Analysis of Policy Options)

The contractor shall develop an economic development toolkit that fully integrates smart growth strategies. It shall present a set of actionable steps for the city of Kelso to create greater economic opportunities in the South Kelso neighborhood while improving environmental, human health, and social equity outcomes. The toolkit shall contain:

- The final draft of task 1, including an additional column in the matrix that contains the policy tools and actions identified in task 2 associated with each goal.
- The final draft of task 2(1).
- A final draft of task 2(2), modified based on community input, with a discussion of the ways it was modified based on that input. The new material shall be 3-4 pages.
- Five vignettes of specific challenges faced by Kelso and how the toolkit could help address those challenges. Each shall be accompanied by a publication-quality photo of Kelso. Each vignette shall be approximately one page.
- How climate change is likely to affect Kelso's precipitation, temperature, and severe weather events based on the future scenarios for the period of 2021-2050 in <http://scenarios.globalchange.gov/scenarios/climate> and how this toolkit could help Kelso address expected challenges. This material shall be one-half to one page.
- Three case studies, each demonstrating how another community has successfully addressed a challenge Kelso faces (e.g., a struggling mall, need to attract manufacturing, poor community health, equity challenges). Each shall be accompanied by a publication-quality photo.
- All other components noted in the Office of Sustainable Communities Report Guidance, e.g., an executive summary, introduction, and next steps section.

The contractors shall submit a complete first draft of the document to EPA three weeks after the conclusion of the site visit. The contractor shall deliver a revised second draft of the document to EPA two weeks after receiving comments on the first draft. EPA comments on the first draft will be limited to the new material not previously commented on. The contractor shall deliver a revised, proofread, and copy-edited third draft of the document to EPA two weeks after receiving comments on the second draft. EPA's review process between drafts two and three takes approximately 8 to 12 weeks. The contractor shall provide all photos and charts used in the document in their native format as separate files, in addition to embedding them in the final document.

The final deliverable shall conform to the Office of Sustainable Communities Style Guide and Report Guidance. The contractor shall include citations using footnotes for all material used in preparing the report, including prior work done by the author. The contractor shall primarily use original language to describe other cited work, including prior work done by the author. Any text

taken verbatim from another source shall appear in quotation marks. All photos, images, and charts used in the document shall be accompanied by OSC's document release form granting EPA permission for use or demonstration that the photo is already licensed for such use.

VII. SCHEDULE FOR DELIVERABLES

The contractor shall provide the following specific deliverables to the EPA TOPO:

	Deliverable	Date Due
Task 1	Document draft 1	Four weeks after community kick-off call
	Document draft 2	Two weeks after receiving EPA comments on draft 1
Task 2	Document draft 1	Four <u>six (6)</u> weeks after submitting draft 2 of task 1
	Document draft 2	Two weeks after receiving EPA comments on draft 1
Task 3	Agendas and invitation lists draft 1	Two weeks after submitting the second draft of task 2, or 6 weeks before the scheduled site visit, whichever occurs sooner
	Agendas and invitation lists draft 2	One week after receiving EPA comments on draft 1
	Site visit	Approximately 8 weeks after submitting the second draft of task 2
Task 4	Document draft 1	Three weeks after completion of the site visit
	Document draft 2	Two weeks after receiving comments on the first draft
	Document draft 3	Two weeks after receiving comments on the second draft